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Gateway User Guide

Form 1 Budget Estimate

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Accessing Form 1

First, navigate to the Unit Main Menu by selecting your unit and then clicking “View Forms, Enter and Edit Budgets.”

Department of Local Government Finance Tasks

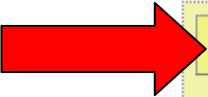
 **Customize Funds, Departments, Debts, Rev. Codes**
View and edit lists of funds, depts., debts by fund and rev. codes.











  **View Forms, Enter and Edit Budgets**
View, edit and submit Forms to DLGF.

 **County Council Review Worksheet**
View and edit the County Council Review Worksheet for the selected unit.

 **Submit Proof of Publication and Signed Form 4**
View, upload and submit budget-related documents to DLGF.

From the Budget Form Menu, select “Form 1: Budget Estimate” and notice the menu expand beneath Form 1. Then click on the link on the left side of the Form 1 box that says “Click to edit form.”



Current Year Financial Worksheet: Additional Calculations for Form 4B	
Debt Worksheet	
Form 1: Budget Estimate	
 Click to edit form	 Not 'Ready to Submit'.
Form 2: Estimate of Miscellaneous Revenues	
Form 3: Notice to Taxpayers	
Form 4: Ordinance for Appropriations and Tax Rates	
Form 4A: Budget Report	
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate	

Form 1 navigates through a drop down menu that allows users to select a fund and department. Please note that school units will use the Department field in place of their Program Accounts. As shown below,


the form currently displays “No Department.” This is the default for users that are not departmentalized or that have not yet created and linked a department to the selected fund.


BUDGET ESTIMATE FOR

Select Fund:
  

Select Department:
 





If a unit’s user previously completed a Budget in Gateway, the user should notice the funds, departments, and line items with data entered carry over from the previous year. Line items in the Capital Outlays and Debt Service tabs are the exception and will not be rolled over.


Select Fund:
 

Select Department:
 

[Copy ALL Published Amounts for ALL Funds](#)

Select Category Tab

		Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
	Employee Benefits	<input type="text"/>	Health Insurance	\$ <input type="text"/>		\$ <input type="text"/>
	Salaries and Wages	<input type="text"/>	Coroner Salary	\$ <input type="text"/>		\$ <input type="text"/>
	Salaries And Wages	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
TOTALS BY CATEGORY				Total: \$ 0		Total: \$ 0
TOTALS BY DEPT BY FUND				Total: \$ 0		Total: \$ 0
TOTALS BY FUND				Total: \$ 0		Total: \$ 0
TOTALS BY UNIT				Total: \$ 0		Total: \$ 0

 **SAVE**


Ensuring Proper Number of Forms is Available

The availability of Form 1’s are based upon the unit customization of fund and department combinations. To ensure that the proper number and type of forms are available, please be sure that all necessary funds and departments have been added and linked appropriately to each other. For additional assistance, please see the *Adding, Deleting, and Connecting Funds and Departments user guide*.

Entering Data on the Form 1

For each line item, Form 1 collects five pieces of information:

- (1) sub-category,
- (2) line item code,
- (3) description ,
- (4) published amount, and
- (5) adopted amount.

Personal Services	Supplies	Services And Charges	Capital Outlays	Township Assistance	Debt Service
Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount	
 + ADD	Salaries And Wages		\$	\$	

The **Sub-Category** field simply breaks down the selected category to additional sub-categories. You will also note another category in the event your line item does not clearly fall into a specific sub-category.

The **Line Item Code** field collects the local code. This may be the State Board of Accounts codes for expenses or a user's own local tracking codes. Entry of a code in this field is optional; therefore, some units do not use Line Item Codes. The field is included to assist in tracking expenses back to local record-keeping.

The **Description** field should be filled out. This field is mandatory, but is a local description and does not need to tie back to any prescribed code lists.

For each line item, Form 1 collects two values: the published amount and the adopted amount. The **Published Amount** is the amount that is proposed at the beginning of the budget process and published in the newspaper and on Gateway. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution.

New Expenditure Code List



This year the Department has incorporated the State Board of Accounts' expenditure code list. Initially, the most noticeable change is the additional blue category tab. All funds will have a new Debt Service tab appear, while the 0840 - Township Assistance fund also has a new Township Assistance tab. Additionally, a few of the sub category items on the dropdown menu have changed to accommodate the new expenditure code list. A link to the new expenditure code list can be found at:

<http://www.in.gov/sboa/files/2012DisbursementCodes.xlsx>

Adding a New Line Item

To add a new line item, first select the appropriate category from the blue tabs at the top of the form. Next, select the appropriate sub-category from the drop down menu, add a line item code, and then add a description of the expense. Amounts may also be entered at the same time. After data entry is complete, save by selecting the "+ADD" button on the left hand side.

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service	
Sub-Category		Line Item Code		Description		Published Amount		Adopted Amount	
+ ADD		Communication And Transportation		0101-002		Travel		\$ 500	

Editing Line Items

In most cases, the Form 1 contains some pre-existing line items that have rolled over from the previous year. In the event that a line item's code or description needs to be edited, click in the field that you wish to edit and make the desired changes. After edits are complete, click the "Save" button on the bottom right-hand side of the page.

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service	
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount			
×	Salaries and Wages	0101-100	Salary of Trustee	\$		\$			
×	Salaries and Wages	0101-110	Salary of Clerical Help	\$		\$		COPY	
×	Salaries and Wages	0101-125	Pay of Township Board	\$		\$			
+ ADD		Salaries And Wages				\$		\$	
TOTALS BY CATEGORY				Total: \$ 0		Total: \$ 0			
TOTALS BY DEPT BY FUND				Total: \$ 0		Total: \$ 0			
TOTALS BY FUND				Total: \$ 0		Total: \$ 0			
TOTALS BY UNIT				Total: \$ 0		Total: \$ 0			
<div> </div>									

Entering Data on an Existing Line Item

To enter amounts on an existing line item, simply select the field, enter the amount, and click "Save".

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service	
Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount				
	Office Supplies	0101-210	Office Paper	\$ 300	\$				
	Office Supplies			\$	\$				
TOTALS BY CATEGORY				Total: \$ 0	Total: \$ 0				
TOTALS BY DEPT BY FUND				Total: \$ 0	Total: \$ 0				
TOTALS BY FUND				Total: \$ 0	Total: \$ 0				
TOTALS BY UNIT				Total: \$ 0	Total: \$ 0				

Deleting a Line Item

To delete an existing line item select the red “X” on the far left of the page. This will delete a single line item. If an error is made on the sub-category field, delete the line item and enter it below, making sure to select the “+ADD” button once finished adding a new line item.

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service	
Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount				
	Office Supplies	0101-210	Office Paper	\$ 300		\$			

Copying Published Amounts to Adopted

If the budget is adopted without any changes, amounts from the published column may be easily copied to the adopted amount column for the selected fund just by clicking the “Copy all Published Amounts for All Funds” button. You may then want to select the next fund and copy those amounts as well.

Select Fund:

Select Department:

Select Category Tab

Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service

To be more selective about what amounts are copied, click on the blue “COPY” arrow between the published and adopted column. This will only copy the amounts in the current category of the selected fund and department.

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service	
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount			
✗	Employee Benefits		Tax Preparation	\$ 600		\$			
✗	Salaries and Wages		Pay of Township Board	\$ 2,000		\$			
✗	Employee Benefits		Social Security-Civil T	\$ 500	COPY →	\$			
✗	Salaries and Wages		Salary of Clerical Help	\$ 1,400		\$			
✗	Salaries and Wages		Salary of Trustee	\$ 8,000		\$			

You will want to navigate to each combination of categories, funds, and departments to complete the adopted amounts for all line items.

If the adopted amounts have changed from the published amounts, simply type in the adopted amounts and click "Save" at the bottom of the form.

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service	
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount			
✗	Office Supplies	0101-210	Office Paper	\$ 300	COPY →	\$ 100			
+ ADD	Office Supplies			\$		\$			
TOTALS BY CATEGORY				Total: \$ 300		Total: \$ 100			
TOTALS BY DEPT BY FUND				Total: \$ 29,300		Total: \$ 100			
TOTALS BY FUND				Total: \$ 29,300		Total: \$ 100			
TOTALS BY UNIT				Total: \$ 98,801		Total: \$ 0			
Form values saved at 04:35 PM and 39 seconds.							SAVE		

Signing the Form Electronically

At the bottom of Form 1, there is a box for the user to place an electronic signature on the form. Only the user with submission rights will see the signature box.


Form Signature


NAME

TITLE

SIGNATURE/PIN

DATE



 **SIGN AND DATE FORM**

I hereby acknowledge that the submission of this document through the Gateway password and PIN system constitutes an "electronic signature" as defined in IC 5-24-2-2. This submission is intended to, and hereby does, constitute authentication and approval of the submitted document as required by the Indiana Code. I understand that this electronic signature takes the place of my handwritten signature and accomplishes the same purposes as would my handwritten signature in the same circumstance. I further acknowledge that this electronic signature has the same force and effect as my handwritten signature and can and will be used for all lawful purposes. I affirm that I have the real and apparent authority to electronically sign and submit this document on behalf of the unit.

The signature box will be invisible to users with edit or read-only rights.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN code. This PIN code has been sent to the person with submission rights via email. You may contact the Department at gateway@dlgf.in.gov or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.

Form Signature

NAME

TITLE

SIGNATURE/PIN

DATE





Form signature values saved at 02:54 PM and 58 seconds.

 **SIGN AND DATE FORM**

Once you see the red text stating "Form Signature Values Saved," you have successfully signed Form 1. Marking the Form "Ready to Submit"

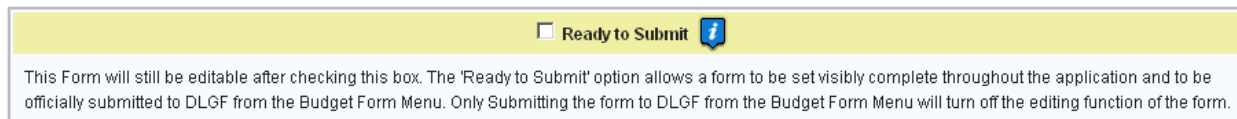
At the bottom of Form 1 and all other forms there are "Ready to Submit" status boxes. Before the form is entirely complete, there will be a grey box titled "Not Ready to Submit."

The budget forms have a feature built in called validation. This does not allow the form to be marked as Ready to Submit, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors in previous years. Upon closer review, you will notice that the box states, "You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been **signed** with a valid four-digit PIN."

 **Not Ready To Submit** 

You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.

Once information has been entered in the published and adopted columns, and the form has been appropriately signed with a PIN, the yellow “Ready to Submit” option will appear. This gives users the ability to mark the form as ready to submit by clicking on the check box. Do not check this box until all the line items, published, and adopted amounts are entered.



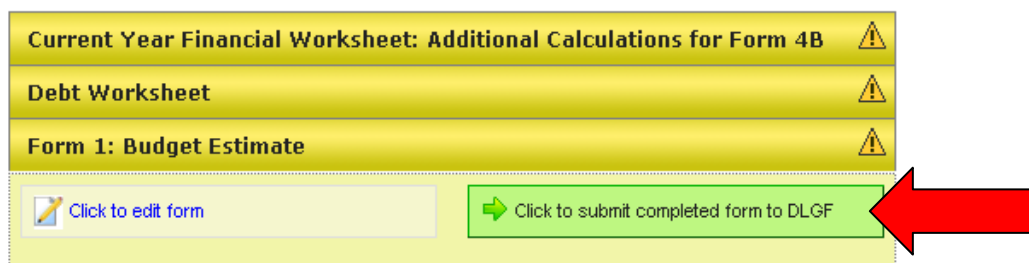
This screenshot shows a yellow header bar with the text "Ready to Submit" and an information icon. Below the header, a text box explains that the form remains editable after checking the box and that submitting to DLGF from the Budget Form Menu will turn off editing.

Once this box is checked, the section will turn green and the form will now be marked as “Ready to Submit.” Form 1 will still be editable until it is submitted.



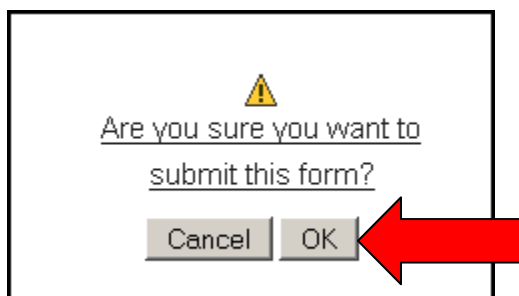
This screenshot shows the same interface as the previous one, but the "Ready to Submit" checkbox is now checked, and the header bar has turned green.

Note that after Form 1 has been marked as “Ready to Submit.” Under the Budget Form Menu Form 1 now shows a green submit option for officials with submission rights.






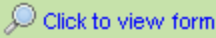

This screenshot shows a list of forms: "Current Year Financial Worksheet: Additional Calculations for Form 4B", "Debt Worksheet", and "Form 1: Budget Estimate". Below the list are two buttons: "Click to edit form" and "Click to submit completed form to DLGF". A red arrow points to the submit button.

If Form 1 is complete and no further changes will need to be made, click on the green “Click to submit completed form to DLGF” button. A pop-up box asking if you are sure you want to submit this form. If you are ready to submit, simply press “OK.”



This screenshot shows a confirmation dialog box with a warning icon and the text "Are you sure you want to submit this form?". It has "Cancel" and "OK" buttons. A red arrow points to the "OK" button.

As noted below, Form 1 on the Budget Form Menu will now appear green and will now only appear in “read only” form.

Current Year Financial Worksheet: Additional Calculations for Form 4B	
Debt Worksheet	
Form 1: Budget Estimate	
  This form has been submitted.	


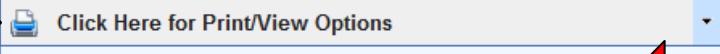
The form may no longer be edited once it has been submitted. If a form has been submitted by mistake, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.


Viewing and Printing the Form

At any point Form 1 can be printed directly from Gateway. Click the button at the top-left corner of the form that reads, "Click Here for Print/Viewing Options." From here, the user will have the option to print the currently selected funds or all funds. Please select one.

[Select Unit](#) > [Unit Main Menu](#) > [Budget Form Menu](#) > **Form 1**

Selected Year: 2013 | Selected Unit: Adams County - 0001 Blue Creek Township, Adams Co.






[Print/View Form 1 for Selected Fund in All Formats](#)
[Print/View Form 1 for All Funds for Selected Unit in All Formats](#)

BUDGET ESTIMATE FOR

Select Fund:

0101 - GENERAL

The page will open in a new window. Once it is open, click on the icon that resembles a save icon in the middle at the top of the page to view the export options.

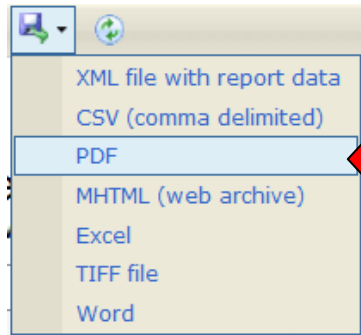
Prescribed by the Department of Local Government
Finance Approved by the State Board of Accounts

Budget Form 1 - Budget Estimate

Year: 2013 County: Adams Unit: Blue Creek Township

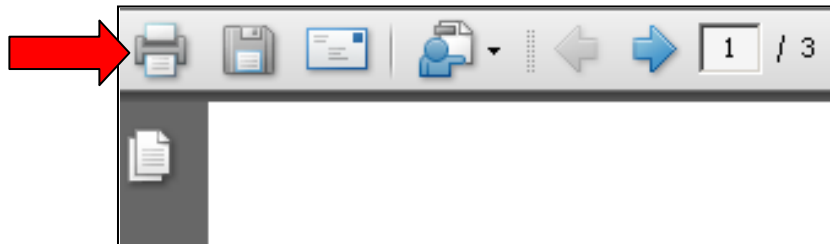
Fund	Department	Category	Sub-Category	Line Item Code	Line Item	Publisl
0061 - RAINY DAY	NO DEPARTMENT	SERVICES AND CHARGES	Other Services and Charges		transfer of funds	
0061 - RAINY DAY Total						
0101 - GENERAL	NO DEPARTMENT	PERSONAL SERVICES	Salaries and Wages		Salary of Trustee	





From the list of export options, Form 1 may be exported into a PDF, Word, Excel, or many other different file types. This allows users to personalize how they wish to have the data displayed.

To quickly and easily print off the form, click on “PDF” and then click the printer icon.



Congratulations! Form 1 has been successfully submitted. Please see our other user guides for assistance with other forms. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.